

EAMS E-Forms Trial Participant Training



Agenda

- Introduction
- Overview of the E-Forms Trial
- Q&A on the Trial
- E-Form Filing with Demonstration
- Q&A on Filing
- EAMS Help Desk
- Q&A on Help Desk
- The Unprocessed Document Queue
- Q&A on the UDQ
- Tips & Tricks from Current e-Form Users
- Q&A on Tips & Tricks with Current e-Form Users

Overview of the E-Forms Trial

- Purposes of trial
- Test e-Forms functionality in EAMS
- Reduce paper flow into system
- Expedite form filing
- Refine proposed regulations

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Duration of Trial

- First round began September 22, 2008
- Second round began October 6, 2008
- Third round begins October 20, 2008
- Additional rounds possible every two weeks
- Ends when e-Forms regulations become effective

E-Forms Trial Agreement Highlights

Electronic Adjudication Management System E-Forms Trial Application and Agreement

To apply for the office identified below (the office) and the organization identified below (the organization) to participate in the Electronic Adjudication Management System (EAMS) E-Forms trial (the trial) the EAMS administrator for the office must complete, print, sign, scan, and submit this application and agreement to the State of Calina, Department of Industrial Relations, Division of Workers' Compensation (DWC), Central Registration Unit (CRU) by e-mail at cru@dir.ca.gov.

Registration Unit (CRU) by e-mail at cru@dir ca_gov
Onganization Legal Name:
Organization Federal Employer Identification Number:
Office Name Requested:
Office Mailing Address:
Office Pless (Green State S

Trial Registration

- Organization
- Person
- User
- Administrator
- Alternate administrator

Logons

- Username
- Password
- E-mail
- Only one concurrent logon

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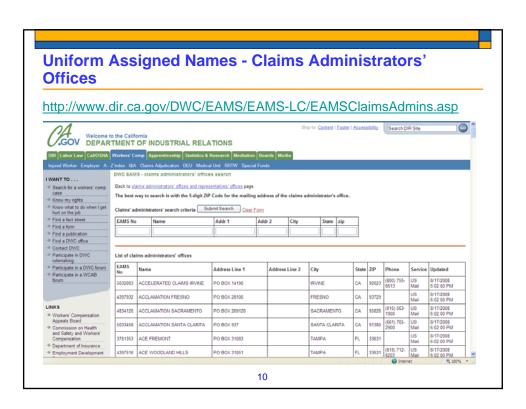
E-Forms Only

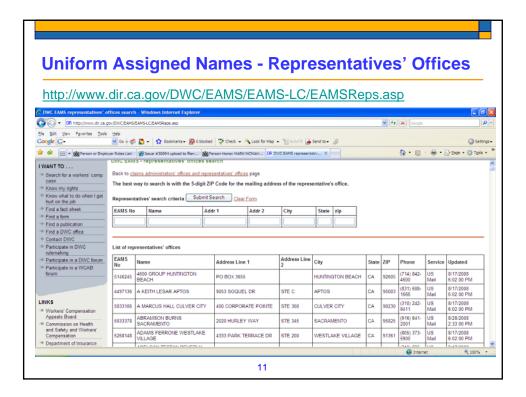
- For duration of participation
- Except documents completed at district office

Uniform Assigned Names

- · Claims administrators' offices
- Representatives' offices
- Anonymous filings prohibited

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Lien Claimant Offices Participating

- ARS LEGAL
- EXARO CORPORATION
- GEOFFREY HODIES SOMERSET
- MED LEGAL PHOTOCOPY SERVICES
- ORTHOPEDIC MEDICAL GRP OF SANTA ANA
- PAIN DIAGNOSTIC TREATMENT SACRAMENTO
- PAIN REHABILITATIVE CONSULTANTS OAKLAND
- REPUBLIC DOCUMENT MANAGEMENT INC
- TRINITY HEALTH WELLNESS ROSEVILLE
- EDD SDI CHINO HILLS
- EDD SDI LOS ANGELES
- EDD SDI SAN BERNARDINO
- EDD SDI SAN FRANCISCO
- EDD SDI SANTA ANA
- EDD SDI SANTA BARBARA
- VQ ORTHOCARE IRVINE
- SCRIPPS HEALTH SAN DIEGO
- SAFETY WORKS MEDICAL LAWNDALE

Computer Based Training (CBT)

- Computer based training http://www.dir.ca.gov/dwc/EAMS/EAMS_CBT.htm
- Certification test
 - Certificate of Completion: to be posted soon

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Civil Code Section 1798 Compliance

- Maintain reasonable security procedures and practices
- Promptly disclose any breach
 - To resident whose information compromised
 - To DWC

Administrator and Alternate Responsibilities

- Enforce contract conditions
- Retain certificates of completion
- Security, procedures, training and supervision
- Report and disclose actual or potential breach
- First level support
- · Assist and participate with DWC

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Additional Conditions #1 Regarding Signatures

Electronic Adjudication Management System E-Forms Trial Additional Conditions #1 Regarding Signatures October 1, 2008

Pursuant to paragraph 26 of the Electronic Adjudication Management System E-Forms Trial Application and Agreement the Division of Workers' Compensation imposes the following additional conditions on the e-forms trial regarding signatures.

E-forms which require more than one signature, the Employee's Disability Questionnaire, and the Notice of Offer of Regular Work, shall have signed EAMS OCR forms attached.

Other e-forms shall use an "S signature" format in lieu of a handwritten signature. An S signature shall consist of the letter S followed by the name of the person signing the document, in the following format: S JOHN DOE

On the EAMS 2581 an S signature alone shall be the individual's signature.

Other e-forms which require a single signature shall have attached, together with the proof of service, an attestation bearing a handwritten signature, in the following form:

I declare under penalty of perjury under the laws of the State of California that I personally entered the information on the attached e-form, or caused that information to be entered, that I placed or authorized my S signature to be placed thereon, and that by my signature on this form I validate and authenticate my S signature on the e-form.

| Dated: | Signature: |
|--------|------------|
| Dated. | oignature. |

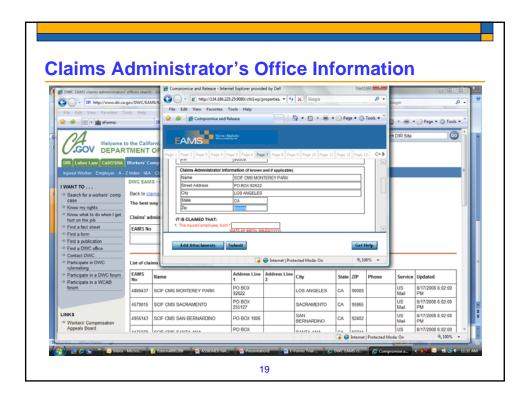
Signatures

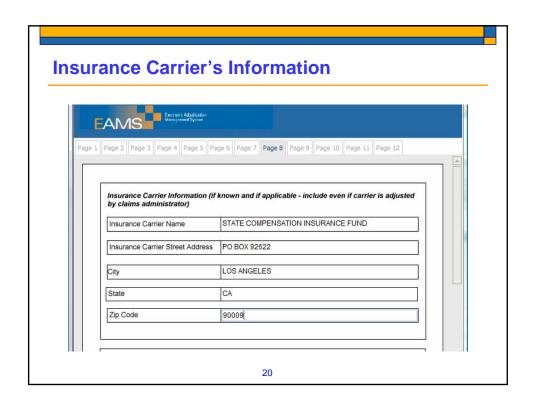
- Attach signed OCR forms
 - Forms with more than one signature
 - Employee's disability questionnaire
 - Notice of offer of regular work
- EAMS 2581— S signature sufficient
- Other forms with only one signature
 - Signature verification attached
 - Together with proof of service
 - Use proof of service document title

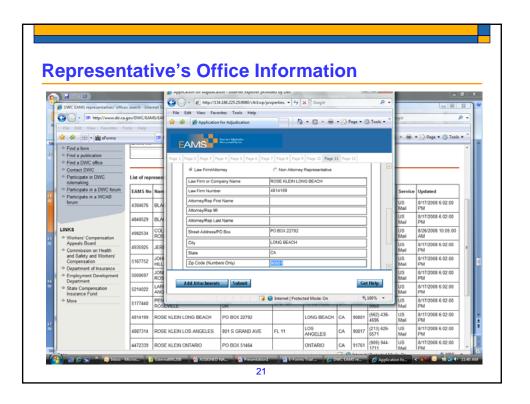
17

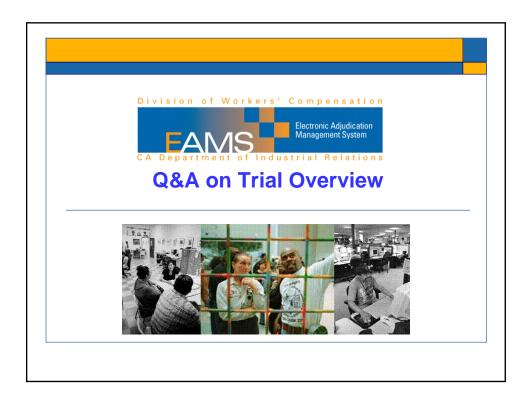
Registration of Uniform Assigned Names

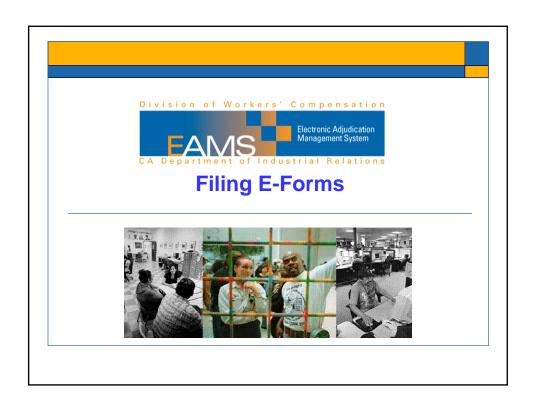
- Uniform assigned names
- Claims administrators' and representatives' offices
- Register with cru@dir.ca.gov

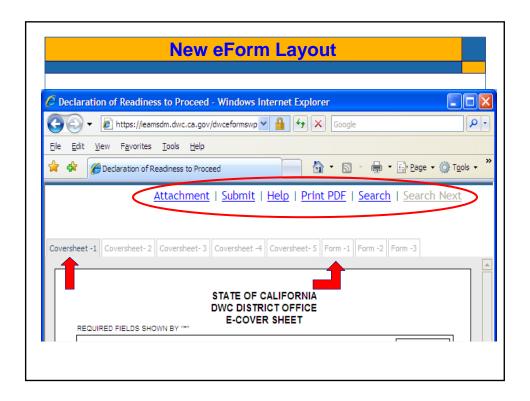


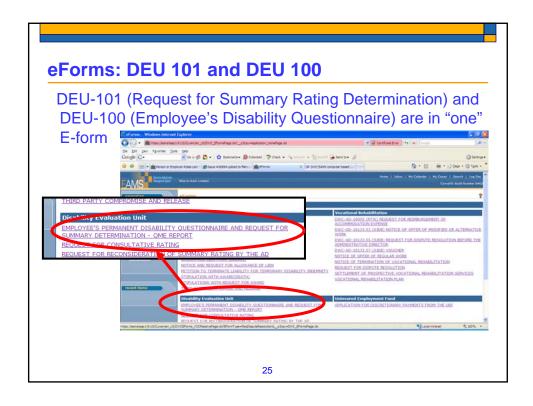


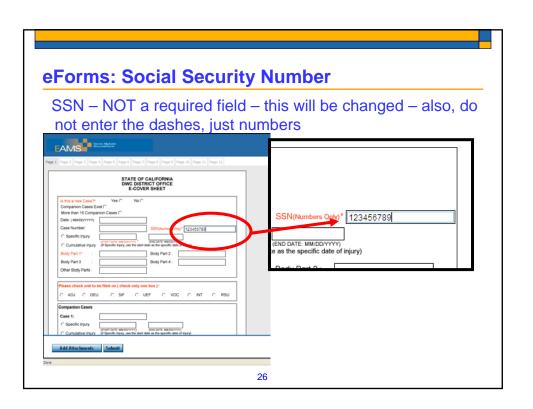


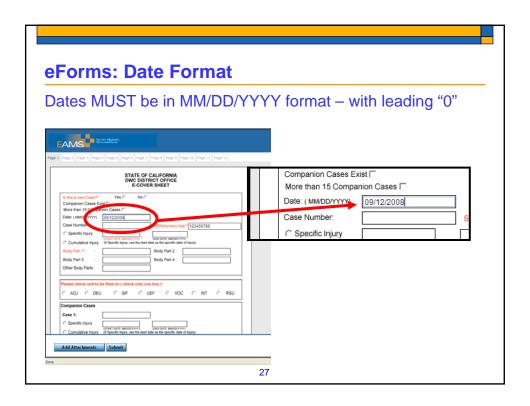


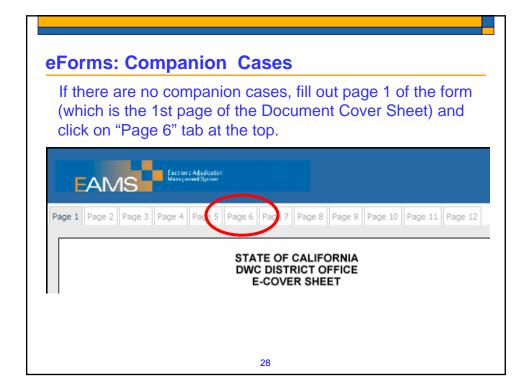








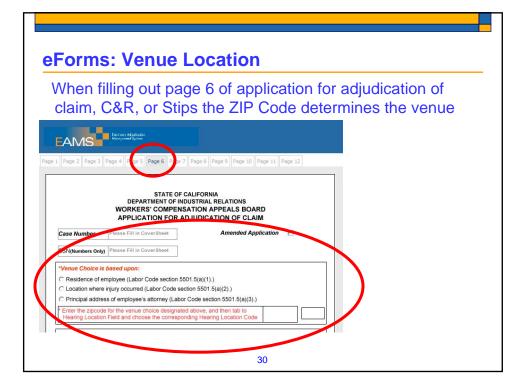




eForms: Document service

- When you have to serve documents to other parties you will need to print your eForm, but now you can use the "print PDF" function on the form to print all at once and/or save to your hard drive
- You only need to print the pages you have filled in data on
- PRINT BEFORE YOU CLICK SUBMIT

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eForms: Errors

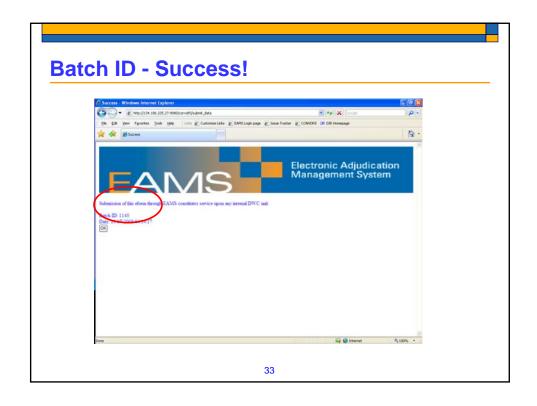
If you enter a future date in a required field, or fail to enter any information in a required field you'll get an error message. Click OK and you will be redirected to the specific field to fix the error. HOWEVER, if you misspell names, addresses, etc. in a required field – your document will then go to the unprocessed document queue (UDQ) where a clerk will try to figure out what went wrong.



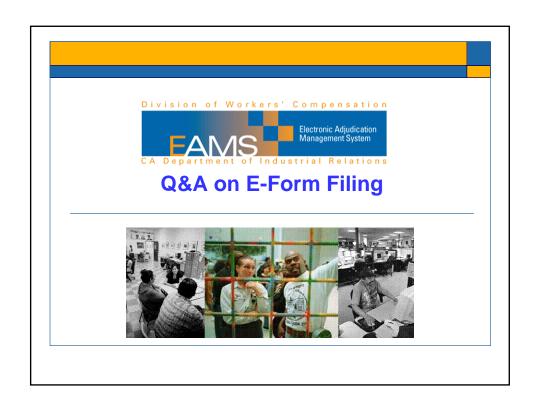
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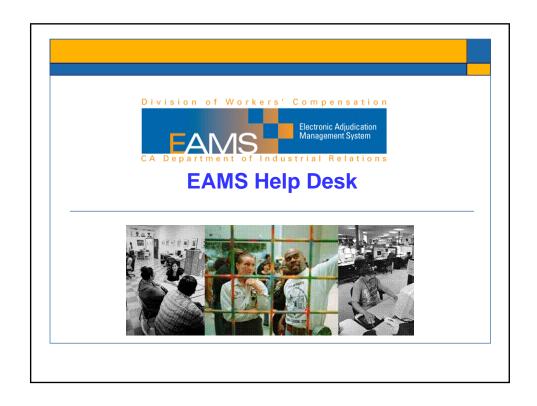
Proof of Service: Signatures

- Suggest you make your signature verification part of your proof of service page. Even if it becomes a 2-3 page document, it is still just one document.
- If you are attaching a list of the case participant(s) you are serving, make it an additional page of the proof of service so you only have one document.









About the EAMS Help Desk

- Call Center History
 - Established in 1998
 - Initially assisted only a few of the district offices with the public's questions about case status & unrepresented injured workers
- Call Center vs. EAMS Help Desk
 - Call Center continues to assist the public with questions (request for continuance, running late, OTOC's, I&A, etc...)
 - EAMS Help Desk is part of the Call Center
 - 5 EAMS experts handling calls and e-mails

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Contacting the EAMS Help Desk

- E-form trial users to contact EAMS Help Desk when you have question(s)/problem(s)
- Preferred method of contact is:
 - 1) Send an e-mail to EAMSHelpDesk@dir.ca.gov
 - 2) Call the Call Center @ 1-888-771-3267 option #4
- Hours: 7 a.m. to 6 p.m.
 - e-mails after 5 p.m. may be handled the next business day
- NOTE: Only the administrator or alternate may contact the EAMSHelpDesk

eForm Submission

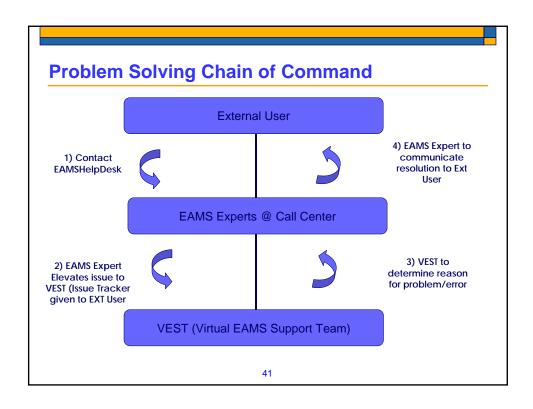
- Completion of e-Form submission will generate a batch ID#
- Print batch ID# and keep for future reference
- Verify next day to see if your e-Form was successfully submitted in case
- Don't see it???
- E-mail information to EAMSHelpDesk@dir.ca.gov so we can research to see what happened to the e-form

(Please include batch id#, case #, IW's name, and the type of e-Form submitted, screen shots when appropriate, your contact information)

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Problem Solving in EAMS

- If EAMS expert is unable to determine problem after researching issue will be submitted to "issue tracker"
- What is issue tracker?
 - Additional team of EAMS experts who investigate and resolve issues (VEST)
 - Issue tracker ID# will be given to external user as a reference number to track status
 - Upon response from issue tracker, external user will be contacted and notified of outcome



Helpful Hints

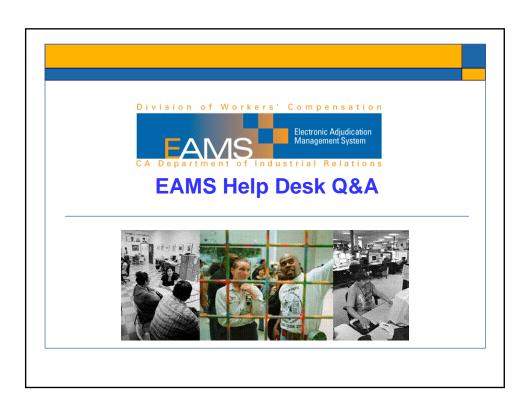
- Take screen shots of error messages
- How? <u>ALT + Print Screen</u> then save into a Word document and attach to your e-mail for Help Desk to view & possibly submit to issue tracker
- 15 minutes of inactivity on EAMS will time you out
- 30 minutes of inactivity on E-Form will time you out & will have to start E-Form all over
- If you are working on an E-Form and EAMS times you out, you can still submit your E-Form

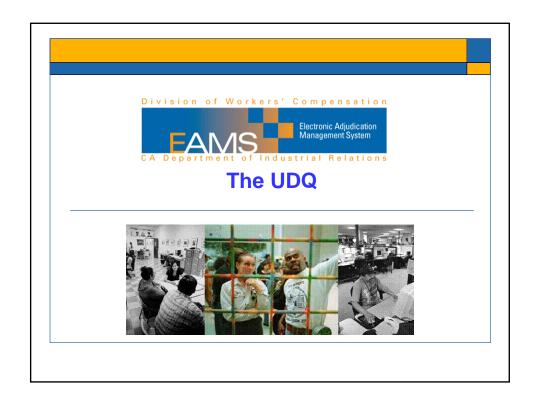
eForm Filer Partnership

- Patience & teamwork
- E-Forms trial participants help find potential bugs
- Thank you!!!



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What's the UDQ?

- Unprocessed document queue
- Where forms with mistakes end up
- Processed centrally for now
- In the future will be processed at local offices

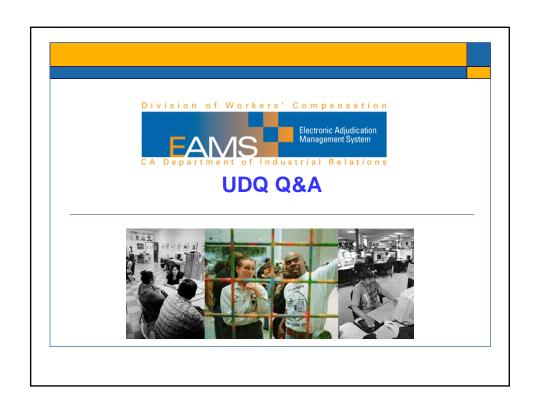
Staying out of the UDQ

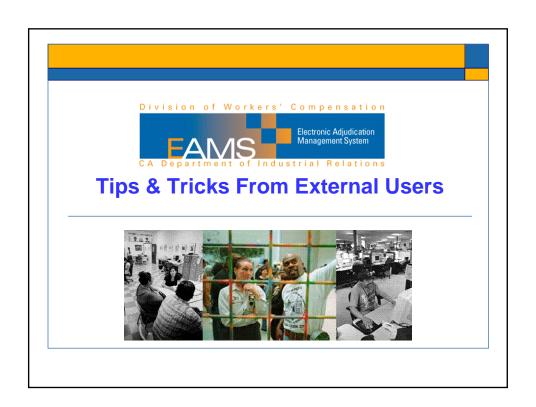
- Make sure you have your own uniform assigned name and everyone else's exactly right
- Look at your case in EAMS and get all information you need to file your document before you file it
- Not sure if you have the correct case number and name? Use the case number lookup tool on the Web site
- If filing an amended document make sure the information you enter about the original document exactly matches what's in EAMS. And, make sure the amended box is checked!
- Can't see your case in EAMS? E-mail the Help Desk and get it associated with your login so you can see your case and get the information you need before you file your document
- DO NOT e-file the document a second and third time
- If your EAMS reference number in the case is not your primary number e-mail the Help Desk and get the number changed before you file your document.

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Staying out of the UDQ: A Few Hints

- Use the proper document title for attachments:
 - The drop down list contains both DWC internal and external users titles
 - You will need to refer to the external document title list that accompanies the OCR document separator sheet for external document titles and ONLY use those
- Make sure the uniform assigned name—not the claims adjuster's name—is in the claims administrator field
- Proof of service is a separate document—the title is in the drop down menu
- Requesting a rating: leave case reference field blank (name, DOB and DOI must be on form and match what's in EAMS)
- Don't check a box unless you mean it—you can't uncheck





E-Forms Tips and Tricks

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- (818) 206-9222
- Fax (818) 206-9223

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E-Forms Tips and Tricks

- ➤ Take advantage of the available tools and resources!
 - ➤ EAMS Web site
 - **≻** CBT
 - ➤ Help Desk
- ➤ Administrator and alternate
 - ➤ Managing the login and password
 - > Training
 - ➤ Problem solving
 - ➤ Contacting the Help Desk
- ➤ Provide feedback!
 - > Report problems
 - ➤ Report useful tips

E-Forms Tips and Tricks

- > ORDER: Gather all pertinent info AHEAD OF TIME
 - > EAMS case numbers
 - Uniform assigned names
 - Addresses for parties
 - ➤ Body parts, etc.
- > PREPARE, SIGN and SCAN all documents to be submitted with your e-form ahead of time.
- ➤ LOG-OUT Fill out your e-forms without interruptions to avoid being logged out from EAMS/e-forms
- ➤ PRINT your e-form *before submitting* & serve on parties

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E-Forms Tips and Tricks

- ➤ E-filing allows for:
 - Accurate, faster submission time for you
 - Faster document processing at the District Office
 - Immediate submission status check

Overall efficiency and timely results

AND IT'S EASIER!

E-Forms Tips and Tricks

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711 14th St

Modesto, CA 95354-2506

- (209) 548-0890
- (408) 904-8731 (cell)

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Filling out e-Forms by Copy and Paste

- Be prepared: Have all necessary data available before you open an e-Form
- Create a case report from your case management software including all address records, injured body parts with codes, injury dates, including your own address, etc.
- Export the report to a text file, Microsoft Excel spreadsheet or Word document
- If your have an EDEX inquiry report use it for your e-Form

Filling out e-Forms by Copy and Paste

- Open the exported report and verify that you have the correct EAMS case numbers and Uniform Assigned Names where necessary. If not use the EAMS search functions and enter the results in your report
- Open your E-form next to your report
- Copy text blocks from your report and paste them into your E-Form
- E-Forms and mice don't like each other:
 - Trick for right-hand mouse users: Use <CTRL>c to copy, <CTRL>v to paste
 - Trick for left-hand mouse users: Use <CTRL><Insert> to copy,<SHIFT><Insert> to paste

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